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Subtle distinctions in the construction of 'reference societies': the conflict-laden introduction of compulsory schooling and universal conscription in Chile (1885–1920)

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ABSTRACT

This article combines the perspective of transnational transfer with contributions from social theory and historical sociology – specifically the Luhmannian concept of social 'inclusion'. In doing so, this article reconstructs a historical case regarding the conflicting implementation of universal conscription and compulsory schooling in Chile in the context of a reform process that took place at the turn of the twentieth century and was oriented towards the German Reich. The article aims to trace both the structural correspondence between compulsory schooling and universal conscription and the statutory implementation of both versions of 'inclusion' by analysing the lines of argument set forth by the warring liberal and conservative groups of actors and, in particular, their discursive references to the German Reich and Prussia. The main arguments are, firstly, that the German Reich was extremely attractive to broad and even opposing coalitions because of its ambiguity. Secondly, a contradictory conception of citizenship prevailed. Thirdly, a social mobilisation process led by professionalised teachers and officers finally made the introduction of compulsory schooling possible. The article ultimately confirms the fundamental role of 'reference societies' in the context of nation-building and modernisation processes in Chile.

KEYWORDS

Social inclusion; compulsory schooling; universal conscription; Chile; Germany; educational transfer; reference society

Conceptual frameworks: 'Reference societies' in modernisation processes

This article brings together two lines of international and historical-*cum*-comparative scholarship: On the one hand, it describes an instructive example of the construction and utilisation of 'international arguments' in educational reform debates. On the other hand, the article relates this line of analysis to a study of pivotal reform processes – in education as well as in other spheres that are crucial to a modern polity – that were pursued in Chile towards the end of the nineteenth and the beginning of the twentieth centuries. In so doing, it introduces conceptual perspectives drawn from historical sociology and social theory that make it possible to interpret these reform processes as essential components of more encompassing processes of modern state formation and nation-building.

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The first line of analysis links up strands of comparative and international research that have attracted much interest over the past several decades because of their innovative approach to the study of processes of transnational transfer as well as global diffusion and the context-specific adoption of educational models, programmes, policies, and organisation patterns. One should start by mentioning the conceptual model and substantive studies carried out by Phillips and Ochs (2004) and Phillips (2011), respectively. They focus particularly, though not exclusively, on educational policy transfer in the wider European context and, in so doing, pay special attention to historical transfer processes and the phenomenon of 'attraction'. Steiner-Khamsi (2004, 2012) has made substantial contributions to this line of research, as have Beech (2011) and Jules (2012). They have met with much response as they argue against the backdrop of the present-day globalisation and discuss their findings with reference to concepts and theories that assume an emergent 'world culture' in neo-institutionalist terms. In other words, the more these studies scrutinise the intricate adoption and re-contextualisation of purportedly global models and policies in varying socio-historical contexts, the more they are in a position to counter wide-ranging globalisation hypotheses with critical evidence. Finally, Schriewer (1988, 2007) has developed a sophisticated model of the ever-selective transformation of educational organisation patterns, reform movements, thought traditions, and policy trends – observable at the *inter*-national level – into arguments that can be utilised in varying countries' *intra*-national reform debates. Drawing on an extensive body of documentary evidence as well as on the sociology of knowledge that evolved within the wider framework of Luhmannian theory of self-referential social systems, Schriewer has consistently contrasted the social-scientific method of comparison with the procedures of 'externalisation'. The latter are interpretive procedures framed by domestic reform concerns and necessities, which are meant to sift out some 'supplementary meaning' from external instances and points of reference and are expected to enrich and support a country's, party's, or organisation's policy positions. Well beyond merely theoretical conceptualisations, this model has also informed substantial amounts of empirical research on 'Constructions of Internationality in Education', the findings of which stand in contrast with and call into question some of the guiding assumptions of the neo-institutionalist 'world culture theory' (Schriewer 2004; Schriewer and Martínez 2004). Moreover, it is a particular advantage of the externalisation model that it invites deepened analyses of the socio-cultural contexts, out of whose necessities, constraints, and reform concerns externalisations are being projected and corresponding 'reference societies' are being constructed. Therefore, this model quite naturally leads to the second line of analysis mentioned at the beginning.

The second line of analysis is devoted to describing the context of the late nineteenth-century Chile; her international situation in the wake of the so-called Saltpetre War[1] successfully fought against Bolivia and Peru from 1879 to 1883; her socio-political and constitutional conditions; and the emerging necessities for wide-ranging reforms aimed at transforming hitherto fragmented sectors of institutionalised schooling into a real 'national' system of education. For several decades, educational system formation processes have been the subject of impressive accounts produced in the fields of both historical sociology and historically oriented comparative education. Classic exemplars such as Archer (1984) and Müller, Ringer, and Simon (1987) or the more recent studies by Green (1990) provide sufficient evidence of this. In a couple of essays following similar lines,

Schriewer (1985) and Schriewer, Orivel, and Swing (2000) provided the outlines of education system formation conceptualised in correspondence with more encompassing social modernisation and differentiation processes. A key concept introduced in this connection is the concept of 'inclusion', originally coined in the framework of Luhmannian social theory. Seen through this lens, 'inclusion' corresponds with the primal differentiation of modern society into a multitude of functionally specific areas of social action or subsystems, such as the economy, politics, science, or sports. Thus, 'inclusion' refers to the processes through which every individual gets access to each of the subsystems so constituted: not, to be sure, as an entrepreneur, but as a consumer; not as a politician, but as a voter; not as a physician, but as a patient; and not as a teacher, but as a pupil. While resuming, in this article, theoretical perspectives of this kind, I, at the same time, shall systematically trace two different facets of 'inclusion', that is, *compulsory schooling* and *universal conscription*. These are facets the complementarity of which was clearly represented in early nineteenth-century reform debates and programmes as documented, for instance, by the famous *Rapport sur l'état de l'instruction publique dans qelques pays de l'Allemagne et particulièrement en Prusse* published in 1833 by the French philosopher and later Minister of Public Instruction, Victor Cousin. Cousin not only strongly emphasised the structural correspondence between what he called – using the German terms in his French text – *Schulpflichtigkeit* and *Dienstpflichtigkeit*, compulsory schooling and universal conscription; but, referring to the case of Prussia, he also pointed to the impact the full realisation of both versions of universal social obligation would have for the effective development of a polity.

Taking up these perspectives, the article is first aimed at tracing both the structural correspondence between compulsory schooling and universal conscription (at the level of liberal-minded political discourse) and the statutory implementation of both versions of 'inclusion' (under conditions of conflict and at various points in time) in Chile. Thus, in 1900, universal conscription was established quite smoothly by law and as a result of a broad political consensus, whilst the enactment of compulsory schooling turned out to be an extremely explosive process. It indeed took 20 years from the submission of the first bill to the eventual adoption of the compulsory schooling act in 1920. Chile's position in Latin America could not be more bizarre. The early regulation of conscription made it the region's military pioneer, whereas the late adoption of compulsory schooling put it – along with Brazil and Bolivia – among the laggards of the continent in terms of education policy. Moreover, the politicians engaged in the adoption of conscription only and looking for justification of their programme were aware that they were imagining the same 'reference society' as the supporters of compulsory schooling, namely, the German Empire constituted in the wake of the Franco-German War of 1870–1871. Therefore, in this article, I seek to analyse the role and the weight that was attributed, in the context of the political debates and social conflicts in Chile, to the construction of 'reference societies' or model states that were expected to support either the liberal actors' position or that of the conservative groups of society. My findings are based mainly on the analysis of historical source material such as parliamentary debates, press sources, and monographs.

My first argument is that regarding the introduction of both versions of universal social obligation, conservative politicians sustained paradoxical notions of state coercion (*compulsión estatal*) and universality. Consequently, a contradictory conception of citizenship was used. The second argument is that the German Reich was extremely attractive for

broad and, in this case, even opposing coalitions (see Waldow 2010), mainly due to its ambiguity. By ambiguity, I specifically mean the 'Janus-face' (*Janusgesicht*) metaphor coined by historians with regard to the German Reich. This metaphor refers to the existing dilemma between an authoritarian and monarchic state versus a rather progressive, modern, and inclusive education system (Nipperdey 1986, 5). The third argument is that conservative and liberal actors used the 'German' and the 'Prussian' argument differently and in some cases even for opposing purposes. In addition, I aim to show the links between the subsystems of education and army with respect to compulsory schooling and universal conscription. My fourth argument is that this connection emerged through a social mobilisation process led by professionalised teachers and officers who pleaded for the introduction of compulsory schooling in the context of a 'discourse coalition'.

I will start by sketching out the context and conflicts of the reform process in the education system and the army, its underlying ideological conflict, and the factors that led Chile to construct Germany as a reference horizon, for their reform. In the following sections, I will analyse the lines of arguments made by liberal and conservative actors and their discursive references to Germany in the discussion of the reform with respect to both versions of universal social obligation. Special attention will be paid to the discourse strategies employed by the conservative actors. Finally, I will discuss the social mobilisation process that was employed by teachers and officers and that ultimately led to the introduction of compulsory schooling.

The 'German reform' of the education system and the 'Prussian reform' of the army

In contrast to the Rio de la Plata territories – i.e. today's Argentina – and Peru, which had been ruled by wealthy viceroys, Chile was considered the 'poorest colony of the Spanish empire' (Sagredo 2006, 7). After its independence in 1810, and well into the nineteenth century, the young republic was characterised by an authoritarian order of society, oligarchically linked elites, and by privileges once established under Spanish colonial rule (enjoyed especially by the Catholic Church).

The context of the reform process, which I will analyse here, falls into a ground-breaking historical phase that ran from 1880 to 1930 and that the historians Simon Collier and William F. Sater referred to as the 'Nitrate era' (Collier and Sater 2004, 147). This was a modernisation phase, which, as the name implies, was characterised by economic growth that resulted from the export of nitrates. Thus, the victory in the saltpetre war had given Chile a worldwide monopoly of nitrate, which was at that time still the basic substance used in the production of many fertilisers and explosives. However, the 'Nitrate era' was also characterised by social diversification due to the emergence of a small middle class and an organised labour movement (Collier and Sater 2004, 147). From a political point of view, this era also marked the rise of parliamentarism, which began after the Civil War of 1891, as well as the transition from liberal to conservative governmental phases.

The reform process began in 1881 when a group of liberal reformers presented a very ambitious reform programme pertaining to democratisation, the extension of political rights and freedoms, as well as the suppression of the supremacy of the Catholic Church. A civic nation founded on equality should be able to overcome the authoritarian

and aristocratic character of the oligarchic order that had existed since colonial times. The programmatic intentions of the reformers were to expand and consolidate nation-state sovereignty (see, also for the following paragraphs, Alarcón 2014, 3ff).

The reforms to be implemented included a massive and far-reaching redesign of the material and technological resources of both the education system and the army, in particular, the introduction of new curricula, training programmes, regulations, and uniforms. They also implied a reorganisation of teachers' colleges and the cadet school (*Escuela Militar*) as well as the establishment of two pivotal institutions, the Pedagogical Institute (*Instituto Pedagógico*), for the academic training of secondary school teachers, and the Military Academy (*Academia de Guerra*), for the training of staff officers. These institutions would contribute in a decisive way to the process of professionalising teachers and officers. Because it lacked local experts and professionals to implement the reform, the Chilean State hired an unprecedented number of foreign teachers and experts. From 1883 to 1920, a total of 140 German teachers and lecturers worked in Chilean schools, at teacher training institutions, and at the Pedagogical Institute, while 54 Prussian instructors were called to conduct military training. In addition, 15 Chilean primary and secondary school teachers attended Saxon teacher seminars and German universities, and 100 Chilean officers were admitted to Prussian units and military schools. Because both reforms were patterned on models and programmes from the German Reich, it was only appropriate that Chilean historiography labelled them the *reforma alemana* (German reform) in education and the *reforma prusiana* (Prussian reform) in the army.

In view of the fact that, during much of the nineteenth century, France had served as a model for Chile, Chile's sudden orientation towards the more extraneous Germany seemed peculiar. Apart from German immigrant groups who settled from 1850 to 1875 in the south of the country, Chile and Germany did not share particular cultural traditions, a common language, or a similar political system; nor had they had any close trade relations with each other, until then. Chile was also the first country in Latin America to stylise Germany as a model for the reforms of both subsystems, while the majority of the other countries emulated either France or the USA. In contrast to the Japanese case, it is also interesting to note that no constitutional reform modelled on Imperial Germany was carried out, in Chile.

Three factors explain this reorientation. The first factor involves wars, which, as profound crisis events, are typical motives for reform pressure and the associated process of model construction (Phillips and Ochs 2004). During the Saltpetre War, new geopolitical alliances emerged. A failed military intervention plan against Chile, organised by France, on the one hand, and the neutral to friendly attitude that Germany had shown towards Chile, on the other hand, explain both Chile's departure from France and her turning towards Germany (Cruchaga Tocornal 1949; Hell 1965). In addition, liberal reformers associated the Prussian army with 'military efficiency' and 'prestige' (Alarcón 2014, 102–103) due to the already mentioned Franco-German war of 1870–1871. A second factor involved the reports of educational travellers. While today, international large-scale student assessments such as PISA or TIMSS as well as corresponding rankings distinguish the education systems of certain countries as 'world class', it was globally circulating travel reports by intellectuals such as Cousin that encouraged the nineteenth-century Chilean reformers to publish their own explorations on Germany. Major figures among these reformers were the lawyer, educator, and politician Valentín Letelier (1852–1919) and the

lawyer and teacher José Abelardo Núñez (1840–1910), both of whom served as diplomatic agents in Germany. Of course, the Chileans were not the only ones who, at that time, imagined Germany and Prussia as their model state. Rather, in the educational policy discussions of the nineteenth century, the 'German example' enjoyed an almost global presence in Europe, Asia, and the Americas (see Schneider 1943; Digeon 1959; Phillips 2011). Lastly, this 'example' did not arise in a vacuum: The country benefitted from a relatively early build-up of a state-run education system that had led to high literacy rates and, ultimately, to high technical and industrial productivity.

In principle, the selection of an external reference point serves the purpose of legitimation for conflict-prone reform intentions. This holds true also for the Chilean reform process which was embedded in a deep ideological conflict in which conservative elites allied with the Catholic Church on one side faced liberals oriented towards positivist scientific ideals on the other. The mouthpiece for the liberals was the *Partido Radical*, founded in 1863 from the extreme wing of the *Partido Liberal*, while the Conservatives joined forces in the *Partido Conservador*. The central object of dispute between the two factions was the education reform, or more precisely, the education policy principle of the *Estado Docente*. This principle points to the idea of a state-controlled public education system that is accessible to all. The reformers argued that a national education (*educación nacional*), which includes all citizens, can be guaranteed only through the enforcement of the *Estado Docente*. But the conservative circles were opposed to these efforts because they considered them a threat to the position of the Catholic Church in education. Therefore, they countered the *Estado Docente* with the principle of *libertad de enseñanza* (liberty of instruction), which means rejecting any kind of centralised authority in educational matters, and defending the right of the parents 'to establish, attend, and teach at private schools' (Duranti 2017, 291).

This ideological conflict escalated in the context of the debate on the introduction of compulsory schooling. The opposition was centred on the already mentioned conservative resistance to what has been described, from the vantage point of the present-day modernisation theory, the 'state usurpation of Church authority over the spiritual welfare of children' (Ramirez and Boli 1994, 14). Conservative circles were therefore generally 'not favorably disposed toward an extension of the system of public primary schools' (Reinsch 1909, 518). It should be noted that the Catholic Church, as a 'transnational organization', was regarded as one of the great obstacles to compulsory schooling in the nineteenth century (Ramirez and Boli 1994, 14). But further interests were involved in the debate, as well. Conservatives, for example, took over the political representation of economic interest groups, chiefly of great landowners and traders and later also of industrialists. As representatives of these 'partial societies', they opposed the 'universalist ideology' on which the law on compulsory schooling was founded, as this would deprive them of a future workforce (Ramirez and Boli 1994, 15).

The universal conscription: eyes on Prussia

The law for universal conscription was adopted on 5 September 1900. In contrast to the parallel and extremely lengthy compulsory schooling debate, the military project was approved with a broad political consensus after 15 months of parliamentary debate. One factor in this agreement between liberal and conservative actors was that the military

was considered the most effective instrument that could be used to defend the hegemony in the South Pacific, won after the Saltpetre War. This was a hegemony that appeared challenged, for example, by border disputes with Argentina as these disputes had come to a head in 1898 and had led to a veritable arms race between the two nations (Schäfer 1974). Another factor was the acting Inspector General of the Chilean Army, Emil Körner, a seconded Prussian officer, who enjoyed considerable influence in Chilean society and actively supported the reform. He insisted on the role of compulsory military service as a means of the education of the people, but, at the same time, followed strategic interests as he tried to promote the German arms industry in this context (see Sater and Herwig 1999).

The Chilean conscription law was based almost exclusively on the provisions of its Prussian prototype. Acting as a senator during the parliamentary debates, the conservative leader and ideologist of the Conscription Law, Ricardo Matte Pérez, a former War and Navy Minister, pronounced his enthusiastic support of this model. His glorification of the model went even so far that Matte erroneously attributed a pioneering role in the establishment of general conscription to Germany (and not France):

> Of all countries which have adopted universal military service, Germany, which was the first one to establish it, is the one that has achieved the most complete superiority in its organisation and development, the one that has gained through it the most positive advantages, and the one that has served as a model for those countries that later on, because of understanding its benefits, were pushed to imitate her. (CN 1900, 890)[2]

The new law replaced the model of the National Guard (*Guardia Nacional*) that originated from the time of Spanish colonial rule and consisted mainly of volunteers. According to its advocates, in a highly socially hierarchical country such as Chile, general conscription should lead to the creation of a 'school of the nation'. This idea, which had found dissemination in the Prussian *Vormärz*, sees the army as a 'school of equality' where 'men of different social and regional origin and denominational affiliation' would follow 'a common, homogenized curriculum' (Frevert 2001, 119–356). Interestingly enough, former War Minister Matte invoked the Prussian idea of a 'school of the nation' and connected it with the principle of 'democracy' in order to appeal to the Liberals:

> Instituting this service (i.e. universal conscription) – that is, a basically democratic institution that invigorates the population and creates a useful community among the members of society, which allows the lower classes to improve their traditional habits and to soften their harsh nature, while allowing the upper classes, who daily get in touch with the former, to learn to appreciate them and associate with them – will complete the framework of our republican institutions. (CN 1900, 893)[3]

Referring to the Prussian example, military service was therefore regarded as a fundamental element of domestic policy (Frevert 2001, 118). As Matte argued:

> It is this service that has done the utmost at all times and in all countries to promote social harmony and peace, and has made class hatred and prejudices disappear. There is nothing that may last longer than the bonds formed between comrades of the same battalion […]. (CN 1900, 893)[4]

Its political supporters saw conscription as an instrument by which to administer social discipline to the lower classes. Military reformers hoped that during conscription, the recruits

would learn 'to appreciate order, discipline, and morality, essential foundations of the republic' (CN 1900, 893). According to Matte, this objective would be of high strategic value for a 'people', as Chile 'is not a model of temperance and culture' (CN 1900, 893). Paradoxically enough, however, conservatives viewed these same social goals as endangered by the introduction of compulsory schooling.

In spite of the statements made in the discourse, the conscription law did not result in a 'school of the nation', for conscription did not turn into a successful means of social integration. Many sons of the upper classes were able to circumvent mandatory conscription through exemptions and other strategies (Rodríguez Lazo 1930, 63). As the result of a complex re-contextualisation process, conscription, formerly seen as a 'school of the nation', was transformed into a 'school of the *rotos* (ragged)', as the representatives of the lower classes were called. The recruits were mostly wage labourers (*peones*) and miners. Most of them were illiterate (Tejeda Lawrence 1920, 28). Given the problem of illiteracy, the new conscription law prescribed the establishment of regimental schools in all barracks (*escuelas regimentales*) to offer primary education to recruits. These barracks schools actually gained prominence as an educational programme that was used strategically as a substitute for a compulsory schooling law. Consequently, they took over the socialisation functions for the lower classes that compulsory public primary schools were still not legally mandated to fulfil (Alarcón 2014).

In summary, there was a consensus between the liberal and conservative actors regarding the law on military service: on the one hand, they agreed with regard to the exemplary status of the Prussian regulation, and on the other, they shared similar expectations concerning the geopolitical and social-inclusive functions that compulsory military service would achieve. However, the implementation of the law showed that, in the military, the 'inclusion' principle was not really implemented.

The battle for compulsory instruction and the 'German argument'

An important conceptual distinction is necessary here. The first discussion of the reform concerned almost exclusively the introduction of compulsory *instruction* rather than compulsory *schooling*. This meant that the debate and the subsequent bills did not actually require the children to attend a state-run school. Rather, all children should receive sufficient instruction, either at home or in a school, the latter being either private, or Church-run, or public. It was only in 1917 that a compulsory *schooling* project that required the children to attend a school, either private or public, was presented.

The first discussions about the idea of compulsory instruction were initiated by reformers such as Valentín Letelier and José Abelardo Núñez, both members of the Partido Radical. In fact, already in 1856, the liberal-minded brothers Miguel Luis and Gregorio Víctor Amunátegui – both inspired by Victor Cousin's report and his glorification of Prussia – had campaigned for such a law and for the 'excellent model of Prussia' (Amunátegui and Amunátegui 1857, 5).[5] But their campaign did not succeed because of conservative opposition. Twenty-six years later, José Abelardo Núñez ventured into a new start. He stated that the basis of the German educational system is compulsory instruction and concluded that the 'German primary school is the most democratic institution which can be found in an essentially aristocratic country like Germany' (Núñez 1882).[6] Núñez strategically referred to the previously mentioned ambiguity within the German Reich, pointing

at the existence of a *contradiction* between a constitutional monarchy and educational progressivism. But, unlike the Argentine scholar Domingo Faustino Sarmiento (1854, 49), who had disparagingly called this contradiction a 'hodgepodge' (*mezcolanza*), Nuñez refrained from criticising the monarchical form of government. By using this more moderate discourse strategy, he undoubtedly wanted to reach conservative readers. Núñez tried using the 'Saxon argument' to prove that compulsory instruction would not lead to social unrest.

Another discourse strategy employed by Núñez was aimed at convincing clerical-minded conservatives that compulsory instruction was not equal to secularism as some had predicted. With detailed precision, Núñez reported that not only did Saxon Schools provide religious instruction, but that they also resembled a church atmosphere (Núñez 1882). A third discourse strategy was formed around the famous dictum that the Prussian victories at Sedan (1870) were not due so much to the Prussian soldiers but to their schoolmasters (Núñez 1882). The idea that public education should be regarded as a means to achieve military power and geopolitical weight certainly gained in importance in the context of the victorious Saltpetre War.

While Núñez pointed to the 'German-Saxon example', Letelier based his arguments on Prussia. Differing from Núñez, his discourse entirely omitted the monarchic system and barely mentioned the Kaiser. Letelier also tried to provide the theoretical and philosophical foundations of the compulsory instruction law, which he declared an indispensable part of national power (Letelier [1892] 1957). 'Without coercion, there is no universal education; and without universal education, there will never be true equality', he argued (Letelier [1892] 1957, 85).[7]

Apparently, Letelier used the 'Prussian argument' as a means to 'scandalise' – as contemporary scholars would call it (Steiner-Khamsi 2003) – the Chilean educational deficits. The reference to the Prussian compulsory instruction law thus served to point to the 'unfavourable and embarrassing differences' in terms of literacy rates between Prussian and Chilean populations (Letelier [1892] 1957, 86). The Prussian education system was praised for its 'efficiency' with the clear aim of 'encouraging' the desired reforms, in the same ways that Phillips showed in the English case (Phillips 2011, 176).

Letelier specifically linked his admiration for Prussia to Bismarck's idea of a 'strong state' and to his social legislation (Letelier 1886, 83–121). According to him, 'freedom' could not be an absolute principle nor the final goal of politics ([1892] 1957, 85). His argument was that the state must first act on behalf of the common good and intervene with respect to social needs. It is noteworthy that he also pointed out, in this connection, the necessary correspondence of the two fundamental social obligations of compulsory instruction and universal conscription:

> If in the states that are surrounded by enemies universal military service is accepted as a necessity, why should the obligation to instruct those who live in ignorance not be accepted as a necessity, as well? Freedom is violated in one case as it is in the other. (Letelier [1892] 1957, 86–87)[8]

On 27 and 28 September 1889, the idea was also discussed in the context of a teacher's conference, the *Congreso Nacional Pedagógico*. During the meeting, the seminary teacher José María Muñoz Hermosilla who, thanks to a state scholarship, had been able to attend the course of the Dresden-Friedrichstadt teacher training seminar – the oldest

one in Saxony, established 1787 – provided a comprehensive project for that law. In a pamphlet titled 'Reflections on compulsory instruction' (*Consideraciones sobre enseñanza obligatoria*), he indicated the fundamental 'right' to the education of every child (Núñez 1890, 261). In distinct contrast to Jules Ferry's French compulsory schooling laws, which had been adopted seven years earlier, Muñoz's project did not promote a secular education. Muñoz was more inspired by the Prussian General Land Law of 1794 (*Allgemeines Landrecht*) than by the French provisions. Accordingly, he justified compulsory *instruction* with the idea that it ultimately would serve 'the common good', in line with the Prussian legislation (Tenorth 2009, 34). Also, the concept of the state as 'guardian', which could deprive parents of the right to educate their children if they did not fulfil their obligations, was taken from the Prussian example (Tenorth 2009).

The discourse strategies outlined by Núñez and Letelier confirmed the essentially strategic construction of Germany as the major 'reference society' in accordance with the goal of adopting the compulsory instruction law. Far from any idea of essentialist reference constructions, the images of Germany varied even within the liberal faction. These discrepancies were already geographically related. Núñez admired Saxony, and Letelier was an invariable admirer of Prussia. Whereas Núñez strategically underlined aristocratic elements, Letelier ignored such elements and single-mindedly praised the idea of a strong state and social legislation. But in the shadow of the ideological conflict with the conservatives, the two actors were united in their determination to prefer the more moderate German version of compulsory *instruction* over the more radical French solution of secular *schooling*.

The teachers' conference finally proposed that a law should be introduced within three years. Julio Bañados Espinosa, President Balmaceda's Minister of Education, made this resolution his own and announced the introduction of the law for 1891 or not later than 1892. However, the civil war of 1891 put a sudden end to this objective. The conservative governments that prevailed from 1891 on declared that such legislation was not part of their priorities. It was only in 1900 when a liberal-minded Senator of the Radical Party, Pedro Bannen, succeeded in putting the subject back into the political agenda.

Bogeymen, mock fights, and competing 'reference societies'

The discursive sabotage organised by the conservative parliamentarians against Bannen's draft proposal on compulsory instruction should be examined in detail. It is interesting to note that, in the context of their discourse strategies, the conservatives omitted the Prussian–German example and used other 'international' arguments. They also used 'legal' arguments, constructed bogeymen, created mock fights, and presented counter-projects.

My assumption is that the conservatives had the hidden goal of 'educational exclusion' – the de facto exclusion of a certain proportion of the child population from the educational system. As a consequence, the principle of 'inclusion', on which the law was based, became the focus of controversy. Accordingly, the concepts of 'state coercion' and 'universality', linked with the legal implementation of that principle, were systematically declared illegal or unconstitutional.

The draft law, presented by Bannen on 18 June 1900, defined basic education as an 'essential foundation for social progress' (Silva Cruz 1903, 1). Moreover, it postulated that 'civilization and the intellectual strength of a nation' could be measured by the

degree of education of its inhabitants (Silva Cruz 1903). The situation of general education that the law was intended to solve was, in fact, desolate: In that year, only 34.88% of children of primary school age were enrolled in primary school (Braun 2000, 238).

Based on the Prussian model, the project prescribed 'compulsory instruction' for children between the ages of 6 and 12 years (Silva Cruz 1903, 4). Bannen's strategy to opt for obligatory *instruction* stemmed from the insight that the obligation to attend a public primary school would have triggered not only an irreconcilable conflict with the conservative circles of the upper classes but also a direct confrontation with the Catholic Church, which acted as the dominant sponsor of the private schools. It should be noted that a large proportion of children received home-schooling or attended Catholic schools.

The first conservative discourse strategy against the project to be analysed was based on the presentation of 'legal' arguments, i.e. strategic references to the sphere of Law, in this case to Civil Law (*Código Civil*) and the Constitution. The first of these arguments served to attack the principle of state coercion by defending family rights. This is not surprising: Precisely one of the fundamental characteristics of conservative thinking is to privilege 'organic collective organisations' such as the family (Mannheim 1984, 123). Senator Ventura Blanco asked provocatively: 'Where does the state derive from this right to overcome the father of family?' (CN 1903, 182).[9] Nevertheless, the conservative rejection of the principle of state coercion could be described as ambiguous. Although conservatives opposed state coercion in matters of compulsory instruction, they had actually agreed to it without exception in the context of the conscription debate in 1900 by using 'Prussia' as a reference. During those discussions, Senator Ricardo Matte had even endorsed the concept of state coercion in educational matters:

> The state that owes to its sons the obligation to instruct and to preserve them, has to pay due attention to that: by teaching them in schools the most needed knowledge for life, and, in the barracks, the most basic notions for their defence and protection. (CN 1900, 893)[10]

The second 'legal' argument was intended to declare the project unconstitutional because the 'obligation' violated the constitutional principle of the 'liberty of instruction' (*libertad de enseñanza*) (CN 1903). This argument was undoubtedly made to construct a bogeyman because Banning's project by no means 'compelled' students to attend a state school, but, as mentioned, it also included the option for students to attend private schools as well as to engage in home-schooling.

Another conservative discourse strategy was based on 'international arguments', which consisted of the 'French argument' on the one hand and the 'Anglo-Saxon argument' on the other. The reference to France served specifically to defend the confessional principles of instruction (CN 1903, 752). Thus, conservative senators argued that the project would follow the model of the French compulsory school laws and thus lead to 'laicism'. But as mentioned in reference to the principle of the 'liberty of instruction', this was also a matter of staging a mock fight. In fact, unlike the French compulsory school legislation, which was introduced in the early years of the Third Republic – i.e. in 1881–1882 – by education minister Jules Ferry, Bannen's project did not stipulate the secular character of schools. Rather, according to the project, religious instruction and religious symbols were supposed to remain in place. In spite of this, the conservative senators argued as if it were the primary goal of Bannen to establish schools displaying a secular character.

The 'Anglo-Saxon argument' advanced with regard to the English and American school systems served another goal, namely, the presentation of a counter-project. If liberal senators cited school absenteeism as one of the fundamental issues to be solved by compulsory instruction, their conservative colleagues countered that the problem was the *lack* of schools. Therefore, their counter-project postulated the decentralisation of the Chilean educational system. Each municipality was supposed to establish free primary schools called 'community schools' (*escuelas comunales*), which should be directed and supervised by a local school board (*junta escolar*) (CN 1903, 621). Furthermore, each school, regardless of its ownership, was supposed to receive an equal yearly subsidy per each schoolchild who attended. However, private schools would have to subordinate themselves to the rules of the school board to receive the subsidy. In line with the 'Anglo-Saxon example', Conservatives praised principles such as administrative decentralisation, local control of schools, and an emphasis on private sponsorship. According to their argument, these principles would not constitute 'sectarianism' or a 'state monopoly' (CN 1903, 618–620). Parents' rights and 'liberty of instruction' would, therefore, be protected.

On the one hand, these conservative discourse strategies, in particular, the 'Anglo-Saxon argument', show that 'reference societies', such as, in this instance, Germany or Prussia, did not enjoy unlimited, unrestrained hegemony within a given social-political context but had to compete with other 'reference societies'. On the other hand, the 'French argument' presented by the Conservatives is also an example of what Waldow (2016) has called 'negative reference societies'. The referrals to Jules Ferry's compulsory school laws were used by conservatives for the construction of horror scenarios and misleading areas of conflict – such as the threats of *laicism* – and thus for the *delegitimisation* of the liberal education project. Finally, as far as the 'inclusion' issue is concerned, the debates also confirm that conservative politicians understood and represented the ideas of 'state coercion' and 'universality' in completely contradictory ways, depending on whether these were related to compulsory instruction or to compulsory military service.

'Educated' teachers and officers and their role in the eventual adoption of the compulsory school law

After the failure of Bannen's bill, two new attempts were made to pass compulsory instruction. In contrast to the first project, a new generation of professionalised (secondary) teachers and officers, that is, so to speak, the 'children' of the 'Prussian–German reforms', actively promoted the introduction of this law. This group had been formed between 1883 and 1910, in teacher seminars and the *Instituto Pedagógico*, respectively, the *Escuela Militar* and *Academia de Guerra*, by Prussian–German professors, teachers, and military instructors. Some members of the group had also spent time studying in Germany.

In this section, I will analyse the new alliance, which emerged between teachers and officers at the beginning of the twentieth century, by using the term 'discourse coalition' (Wagner 1970, 55–57). What these teachers and officers shared as a result of their training was a perception of themselves as 'servants of the state' who would be committed to a mission of national progress and inspired by an elitist self-image (Alarcón 2014, 2). To the extent that, in Chile as well, the so-called social question (*cuestión social*) moved to the centre of public debate, teachers, and officers focused their attention on the *rotos,*

the children and young people they had met as teachers and instructors in primary schools and *liceos* as well as in the regimental school at the barracks.

A 'discourse coalition' is to be understood as 'a group of actors that, in the context of a particular set of practices, uses for a certain period of time a special compilation of storylines' (Hajer 2008, 217). Storylines refer to a 'dense statement that summarizes complex narratives that are used by people as shorthand in discussions'. These 'storylines' represent the 'discursive cement', composed of arguments, metaphors, concepts, modes of explanation, forms of representation, and problem perspectives (Hajer 2008, 216). The practices of the Chilean 'discourse coalition' formed at the beginning of the twentieth century included the organisation of associations and public conferences as well as the publication of literature in journals, newspapers, and books. While teachers were free to engage in an open political activity, military personnel were not allowed to engage in such activity. The officers, therefore, organised themselves into secret societies (Nunn 1976, 115).

The shared 'storyline' of the 'discourse coalition' of teachers and officers expressed the idea that the existing educational provisions had proved to be hardly effective in terms of social integration. A consequence of this deficit was the epidemic extent of illiteracy. Officer Pedro Charpin, who had been trained in 1905–1906 in the Scharnhorst Field Artillery Regiment at Hanover, argued that 'the disadvantages' which 'the enormous amount of illiterates' 'entails for society's productive capacity are undisputed' (Charpín 1926, 20).[11] The teacher Luis Galdames declared in 1912 that illiteracy posed a 'social problem that requires an urgent solution' (219–220). Schoolteacher Máximo Guerrero (1917), who was also active in the regimental schools, considered it 'a problem of vital interest to the nation' (137).[12] Once again, referrals to the situation in Germany served these actors for the purpose of 'scandalization' (Steiner-Khamsi 2003). Thus, Darío Salas (1910), then a Professor of the *Instituto Pedagógico*, argued that, according to the census of 1908, close to 60% of the population were illiterate, but also that, in terms of school attendance rates, Chile would take its place in the 'rear guard' in the world (15). Likewise, educators and officers agreed that the conservative sabotage of the projects aimed at instituting compulsory instruction was linked to the claim to preserve educational structures organised according to social status.

When the deputies of the Radical Party presented a new draft law for compulsory instruction in Congress, in 1909, the major arguments involved in the conservative discourse strategies of the following years were largely similar to those from the debate at the turn of the century: Compulsory instruction was seen to represent a 'state monopoly' and to violate both the rights of the parents and 'liberty of instruction'. The counter-project presented by the Conservatives was similar to the one they presented in the previous debate: instead of introducing compulsory instruction, the state, should support the existing private primary schools with subsidies (Illanes 1991, 63–64).

Likewise, when the 'German argument' was used by liberal-progressive groups also in their proposals to introduce school meals, in order to curb infant homelessness and poverty, this recommendation was vilified as 'reckless socialism' (*desenfrenado socialismo*) by conservative senators such as Alfredo Barros Errázuriz (CN 1911, 393). Barros defined the draft law as a 'German commodity (*mercadería*)', which would, however, have different consequences in a Latin American country such as Chile in comparison with a 'Saxon' one (CN 1911, 394–397). In 1910, Salas held a public conference on the topic of compulsory instruction at the *Universidad de Chile*. In his lecture, Salas answered to

conservative objections by defending the function of school welfare provided by the state, citing the same model (Salas 1910, 26).

Finally, a third bill was presented by representatives of the *Partido Radical*, on 11 June 1917. Unlike the previous bills, this one was far more radical. Thus, not only was it the first time that compulsory *schooling* (*obligación escolar*) was introduced and not just compulsory *instruction*, but it also included the abolition of religious instruction from the curriculum (Irrazábal Valenzuela 1989, 141–142). In several respects, this attempt, which eventually resulted in the definite enforcement of compulsory schooling, was founded on a peculiar coincidence between the actors of the aforementioned 'discourse coalition'. Firstly, in 1915, a new link between the academic and the political field appeared, as teachers succeeded in pursuing a political career. Secondly, Salas published his famous work on 'The national problem' (*El problema nacional*), the title of which stood as a symbol for the fight against illiteracy through compulsory schooling (Salas [1917] 1967, 41). Thirdly, the Federation of Primary School Teachers initiated a nationwide campaign to call for the people's support for compulsory schooling. This campaign succeeded because it gathered teachers as well as deputies of the Radical and Liberal Parties (Sepúlveda Rondanelli 1993, 90). Fourthly, a military conspiracy, organised by high ranking officers against the government of Juan Luis Sanfuentes, was uncovered on 8 May 1919. These officers called for the opening of an industrialisation process and the adoption of social reform laws, including compulsory schooling (Millar Carvacho 1972–1973, 101).

In this context, the compulsory school law was passed on 26 August 1920 during the presidency of Juan Luis Sanfuentes. Its parliamentary adoption was accompanied by spontaneous manifestations on the streets. Not only did the adoption of the law symbolise a hitherto unprecedented mobilisation process, but it was also the outcome of a political compromise that had long been contested between conservative and liberal-progressive forces. While the conservatives had accepted the principle of compulsory *schooling*, instead of the concept of mere compulsory *instruction*, liberal-progressive and many secular-minded circles had to accept the fact that religious instruction remained in the curriculum, although as an optional subject, and that school meals were not included in the reform. The law also established a state subsidy for private primary schools, a measure which must be understood as a clear concession to conservative interests (Dirección General de Educación Primaria 1921, 19–20).

Conclusion

By focusing on a particular historical case, this article aimed to combine two lines of international and historical-cum-comparative research: On the one hand, it was meant to analyse the practices, common in domestic reform debates, of constructing exemplary 'reference societies' for the purpose of international policy borrowing; on the other hand, in the light of the concept of 'inclusion' as coined in the framework of Luhmannian theory of social differentiation, the article examined the conflictual implementation of compulsory schooling and universal conscription in Chile.

The case in question, which allowed both lines of analysis to be combined, refers to winding debates and processes of reform that took place between the end of the 19th and the first decades of the 20th century and which were strongly oriented towards the

then German Reich. These processes were embedded in a profound ideological conflict, in which conservative politicians and groups of Chilean society that were associated with the Catholic Church opposed liberal-minded reformers and positivist modernisers. While both the conservative and the liberal actors agreed to implement the principle of inclusion in the form of compulsory military service, and while both groups also agreed on the high esteem of Prussian conscription laws, their views differed considerably with regard to compulsory education. The Liberals referred to the 'Prussian–German' model in order to speed up the adoption of the bill, whereas the Conservatives cited the example of other countries, such as the USA and England, considered as models suited to obstructing the adoption of the bill – hence to challenging the very principle of universal public schooling. This opposition, which was in the centre of decade-long disputes, was not only the result of the deeply rooted ideological conflict but was also linked to economic considerations, in particular, the dreaded loss of manpower.

By tracing the successive phases of the disputes eventually leading to the implementation of compulsory schooling, as well as the antagonistic actors involved, their motives, and their ideas on the shaping of Chilean society, the article has shown that 'reference societies' are not static structures but dynamic semantic constructions embedded in highly controversial political configurations and disputes. Accordingly, depending on the urgencies of the hour, the relevant actors and their audience, various and sometimes highly paradoxical images of Germany were in circulation. Think of the exclusively 'Prussian' image of Germany constructed by the Conservatives and based primarily on notions of 'discipline', 'order' and 'morality', as opposed to the more encompassing images of Germany – including as well Prussia as Saxony – which were formulated by the Liberals and which put in the foreground notions of 'democracy', 'equality', and 'strong state'. Therefore, it is obvious that both groups, in the course of their interaction, strategically (re-)defined, relativised or radicalised their views and positions. Conservatives specifically operated a symbolic policy, based on both defensive and offensive lines of argument as well as on mock battles. The peak of inconsistency was reached when imperial Germany was simultaneously associated with democracy, aristocracy, and socialism. However, the fact that such a wide variety of German images were constructed is also attributable to the already mentioned ambiguity or 'Janus-face' of the German Empire.

The conservative reference to the 'Anglo-Saxon example' in the debate on compulsory schooling/instruction confirms the insight that 'reference societies', once distinguished, do not have a monopoly on absolute value or durability, but rather have to compete with alternative model countries. In the context of highly controversial educational discussions, even 'negative reference societies' (cf. Waldow 2016) or argumentative bogeymen may be constructed, such as, in this case, reference to France. Nevertheless, after several decades of ideological disputes, and owing to a social mobilisation process 'from below', a liberal-conservative compromise on the question of compulsory schooling was possible, leading to the adoption of the bill in 1920.

Finally, taking up Victor Cousin's phrasing of the necessary complementarity of *Schulpflichtigkeit* (compulsory schooling) and *Dienstpflichtigkeit* (compulsory military service), this article has shown that the Chilean Conservatives indulged in a limited, or at least a contradictory, notion of the principle of 'inclusion', that is, the access of all citizens to each sphere of activity in modern society. This led to a rather paradoxical implementation of this principle. Not only because of the one-sided temporal priority accorded to universal

conscription, but also considering the fact that the realisation of a purportedly 'universal' conscription factually meant that mainly young men of the middle and lower classes were called up, while the members of the upper class were able to evade their duties. In addition, the pass of compulsory schooling had in Chile a high 'political' added value, because of the close link between electoral rights and literacy (Caruso 2010). It was not until 1970 that the literacy requirement for voting was abolished.

All in all, the case study on the late nineteenth-century Chile reconstructs an important chapter of highly contradictory and multifaceted processes of modernisation and nation-building and, in so doing, confirms the crucial role played by the construction of 'reference societies' in highly controversial modernisation efforts.

Notes

1. Also known as the War of the Pacific (*Guerra del Pacífico*).
2. De todos los países que han adoptado este servicio, la Alemania, que fue quién primero lo estableció, es la que ha alcanzado una superioridad más completa en su organización y desarrollo, la que ha obtenido con él más positivas ventajas y la que ha servido de modelo a los países que posteriormente, comprendiendo sus beneficios, se han visto obligados a imitarla. (Note: All quotations were translated by the author and adapted to the new spelling).
3. Con este servicio, esencialmente democrático, que vigoriza la raza e introduce entre los diferentes miembros de la sociedad una comunidad provechosa que permite a las clases inferiores mejorar sus costumbres y suavizar su áspera naturaleza, que hace que las clases elevadas, puestas en contacto diario con aquellas, aprendan a estimarlas y tratarlas, se completa el cuadro de nuestras instituciones republicanas.
4. Es este servicio que más ha hecho en todos los tiempos i países en pro de la armonía i de la paz social, hecho desparecer los odios i prevenciones de clases. Nada hai que sea más duradero que los lazos que se forman entre los compañeros de un mismo batallón […].
5. El excelente modelo de la Prusia.
6. La escuela de pueblo (*Volksschule*) es por consiguiente la institución de carácter más democrático que puede encontrarse en un país esencialmente aristocrático como la Alemania.
7. Sin coerción, no hay educación universal; y sin educación universal, no habrá jamás verdadera igualdad.
8. Si en los Estados que viven rodeados de enemigos se acepta como una necesidad la obligación del servicio militar, por qué no se ha de aceptar como una necesidad la obligación de la instrucción en aquellos que viven sumidos en la ignorancia? Tanto se viola la libertad en un caso como en el otro.
9. Yo pregunto: ¿de dónde deriva el Estado este derecho para sobreponerse al padre de familia?
10. El Estado que debe a sus hijos la obligación de instruirlos y conservarlos, tiene que atender a ello, enseñándoles en la escuela los rudimentos más necesarios para la vida y en los cuarteles las nociones más elementales para su defensa y conservación.
11. No es un misterio la enorme cantidad de analfabetos que existe en Chile, ni es discutible la desventaja que ello entraña para la capacidad productora de la sociedad.
12. [U]n problema de […] vital interés para la nación.

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